

How did one CPA firm achieve greater flexibility and control of their tax practice while thousands of miles away from the home office?

Sharvin & Associates, CPAs, use Global *fx*®



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Thanks to Global *fx*, CCH's web-based environment that harnesses the power of the Internet to provide convenient 24/7 access to ProSystem *fx*® Tax, Sharvin & Associates can open and update tax forms anywhere, anytime. With clients across the United States and special interests in Southeast Asia, secure, remote access to their client records is an absolute necessity for this firm.



The Future of Accounting



Forward-thinking firms are always looking for ways to better allocate their resources and enhance workflow. Working through remote access is a key to streamlining practices and making best use of available resources. Jim Sharvin, of Ohio-based Sharvin & Associates, knew that to accommodate his active tax practice he would need the ability to access his clients' tax forms while working remotely.

“I would find myself in a different state with a client, wanting to access all my records and forms. I just wanted real quick access to actual tax returns so I could make changes.”

– Jim Sharvin, CPA and owner, Sharvin & Associates, CPAs

Sharvin's first step toward remote access occurred when his CPA firm separated from a larger, associate firm that was moving across town. During the transition period to becoming an individual entity, Sharvin still needed a way to access his files and records from the larger firm's office. Already a CCH customer with ProSystem *fx* Tax, Sharvin believed Global *fx*, CCH's web-based environment that provides secure, remote access to Tax, would be the ticket to remaining separate while still receiving all critical forms and information.

Simple Implementation and Smooth Transition

Global *fx* combines the same powerful features and functionality of ProSystem *fx* Tax with added benefits associated with secure remote access. And since the user interface does not change, the staff simply logs in and operates the program as usual.

“My CCH facilitator for implementing Global *fx* was really good. I had absolutely no problems switching over to Global *fx*.”

Sharvin and his staff trained for Global *fx* with the aid of a CCH facilitator and web-based tutorials. The process was easy, efficient, and simple to grasp since Global *fx* Tax looks and works just like ProSystem *fx* Tax. The CCH facilitator also took special measures to ensure

Sharvin & Associates were equipped with the necessary information to make them feel comfortable and knowledgeable about the product.

Once finished with the implementation of Global *fx*, Sharvin found that Global *fx* not only allowed them to work from home or access files from across town, but also opened up a whole new realm of possibilities for him and his tax practice.



Besides his busy accounting practice, Jim Sharvin, CPA, also devotes considerable time and talent to a Southeast Asian not-for-profit that builds orphanages.

Global *fx* Spans the Globe

While Global *fx* allows staff to work from home or off-site effectively, Jim Sharvin decided to push the remote access feature to the extreme. Sharvin already knew his practice would take advantage of the remote access to ProSystem *fx* Tax through Global *fx* when traveling to see clients across the United States. However, by using Global *fx* and e-mail to monitor his tax practice and its needs, Sharvin was able to fulfill a philanthropic dream and spend several months in Southeast Asia building orphanages through Asia's Hope, a not-for-profit organization (www.asiashope.com).

“I was amazed; looking at these old machines and thinking it would never work. But it did! If you can find a reliable Internet connection, you are pretty much in business.”

Sharvin did not plan on using Global *fx* while on his first, month-long trip to Cambodia. However, after finding an Internet café with a decent connection he attempted to use the program. After

Sharvin & Associates Key Data

- Based in Columbus, Ohio
- Jim Sharvin, CPA and owner
- Focuses on tax and consulting practice for small businesses and high-end clients
- Functions as a conglomerate, sharing staff with two other tax groups



minimal uploading to the café's computer, he was checking up on his clients' tax returns with Global *fx*. Despite being thousands of miles away from home he could access forms and update critical information, giving him peace of mind that his business was functioning properly and efficiently during his trip.

“Anytime you're a CPA and you get involved with a not-for-profit organization, you end up becoming either the treasurer or the person that advises the treasurer.”

Also, he found he could use Global *fx* to help Asia's Hope while on his second trip to Cambodia and Thailand. Being a CPA, it was inevitable that he played a financial advising role for the organization. And, with Global *fx*, Sharvin was able to fill out forms and complete records which were then updated in the United States in real-time. Having brought his laptop along for the trip, whenever he found an available Internet connection he was able to plug in and get work accomplished. He did not have to wait until he came home to update files or download financial information for Asia's Hope.

The workflow at Sharvin & Associates significantly improved when staff at the home office could immediately work on returns updated by Sharvin without having to wait on files or information – with Global *fx* the answers were always readily available through the Web.

The Results: Flexibility and Streamlined Workflow through Secure, Remote Access

Sharvin & Associates were looking for a way to take their firm to the next level while leveraging time spent traveling. With Global *fx*, they found a program that not only gave them a chance to access their tax returns online, but allowed them true freedom with their tax practice.

“I use it everyday and I never have to worry about the upgrading – it is done for me.”

With Jim Sharvin's extensive business and philanthropic travel, the last thing he wants to worry about is upgrading

his remote access software. Fortunately, Global *fx* programs are always current. Thanks to automatic software updates, Sharvin & Associates does not waste time uploading new software. Instead, the staff is always working from the same version of the program – no matter where they are in the world.

“I was in Cambodia for about two months last summer and even though I wasn't storing files on my laptop, I just felt more comfortable knowing I'm accessing it through a secure, remote server.”

Anywhere you travel your client information will remain safe in the event of computer failure or other unforeseen circumstances. CCH provides secure data storage, backup, and archiving as well as the latest virus protection. And you can always backup your client data to your local systems as well.

Also, storage through Global *fx*'s secure server hosting allows firms like Sharvin & Associates to cut back on large storage systems. All programs and data reside on powerful, centralized servers within the CCH Data Center. And you can feel confident knowing that CCH deploys the strongest data encryption routines, firewalls, and other robust security measures to prevent unauthorized access.

“I'm excited about going back to Cambodia and my laptop is once again going to be ready to go. I can actually produce financial statements for this organization and send those data files back to the United States as real-time reports.”

When you work with CCH Tax & Accounting, you can count on a variety of exceptional support options, including:

A Team of Experts – professionally trained in all areas of tax and technical support, just a toll-free call away.

Tax.CCHGroup.com – instant online access to product and training information, support, and program updates.

Regional Support Team – ensures your smooth transition to ProSystem *fx* and assists with any training needs.

Effective Training Options – from in-office sessions to community seminars to Web conferencing.

For more information about The ProSystem *fx*[®] Office suite of software and workflow tools, call us at 1-800-PFX-9998 or visit us at Tax.CCHGroup.com.



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